

Scheme Training Instructor's Guide PO 402-T

Training Handbook PO-402 T

May 1990

A. Explanation.

This is a complete revision of Handbook PO-402 T, Scheme Training Instructor's Guide. The handbook has been updated to incorporate policy changes required by the 1987 National Agreement. This changes Handbook PO-402 T from a revisable (partially revised) to a nonrevisable completely revised) handbook.

B. Distribution.

1. Initial. This document is being distributed directly to:

Each regional Human Resources Director 5 copies

Each division Human Resources Director 1 copy

Each division Manager, Training 6 copies

Each Postal Employee Development Center (PEDC) Supervisor, Training 10 copies

Each CAG A through E Office 1 copy

2. Additional Copies. Order copies from your materiel distribution center using Form 7380, MDC Supply Requisition.

3. On-Line-Availability. The composition and graphics for this document were electronically produced using the USPS SPECTRUM database publishing system. The text is available to USPS users through the SPECTRUM database which is resident at NISSC. To obtain information on accessing this system, contact the Customer Support Branch at NISSC (PEN 878-5001).

C. Rescission.

This handbook obsoletes all previous issues and transmittal letters.

D. Effective Date.

This material is effective upon receipt.

E. Instructions.

Destroy all previous issues of Handbook PO-402 T.

*Elwood A. Mosley
Assistant Postmaster General
Training and Development Department*

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1 Administration

110 Introduction

111 **Scope**

This handbook provides instructions and guidelines for administering manual and computer-assisted scheme training.

112 **Definition**

The terms pertaining to manual scheme training are listed alphabetically in the glossary. Definitions for other relevant terms are listed under the specific subjects throughout this handbook.

120 Responsibilities

121 **Postal Employee Development Center (PEDC)**

121.1 **Manager/Supervisor, Training.** The Manager/Supervisor, Training, (1) controls the use of scheme training programs, facilities, and materials throughout the PEDC service area; (2) ensures compliance with other related handbooks/manuals; and (3) ensures that all personnel engaging in scheme instruction are certified to perform in that capacity. In facilities away from the PEDC, the Manager/Supervisor, Training, certifies the personnel designated to conduct scheme training. The Manager/Supervisor, Training, and staff supply assistance and materials to the certified designated personnel.

121.2 **PEDC Training Staff.** Training staff, under the direction of the Manager/Supervisor, Training, conduct training in accordance with the policies and procedures in this handbook.

121.3 **Manager and Staff Activities.** The Manager/Supervisor, Training, working through the training staff:

- a. Arranges for training space.
- b. Schedules training sessions.
- c. Conducts training sessions.
- d. Coaches trainees and evaluates their progress.
- e. Develops training aids.
- f. Develops lessons.
- g. Administers weekly review and qualification tests.

- h. Maintains training records.
 - i. Assures on-the-job assistance and feedback.
 - j. Evaluates effectiveness of the training system and methods.
- 121.4 **Record Keeping.** The PEDC or designated training personnel are required to maintain records which indicate the amount of scheme training time used and the test results for each trainee. See sample record forms, Form 2432, *Individual Training Progress Report* ([Exhibit 121.4a](#)), and Form 2548, *Individual Training Record* ([Exhibit 121.4b](#)), which are used as follows:
- a. Form 2432 — *Individual Training Progress Report*. This form is used in connection with scheme study to record training time, weekly review results and results of qualification tests. Retain this form for a period of 5 years in a location determined by the Manager/Supervisor, Training. Upon an employee's assignment to another installation, or resignation or retirement, forward Forms 2432 to the personnel office for inclusion in the employee's Official Personnel Folder (OPF) and transfer to the receiving office.
 - b. Form 2548 — *Individual Training Record*. After the trainee completes the training for each scheme, record the individual's total training time used and scheme name on this form. Retain this form at the location determined by the Manager/Supervisor, Training. Upon an employee's assignment to another installation, or resignation or retirement, forward Form 2548 to the personnel office for inclusion in the employee's OPF and transfer to the receiving office.
 - c. Computer-Assisted Scheme Training (CAST) system printouts. This printout is a list of items learned in an individual training session. Retain these printouts for 3 months starting from the date the training is completed. (See chapter [4](#) for additional information on the CAST system.)

Exhibit 121.4a
Form 2432, Individual Training Progress Report (p. 1)



Individual Training Progress Report
(See Privacy Act Statement on Reverse)

Name (Last, First, Middle)				SSN								
Home Address (No., Street, City, State, ZIP + 4)				Home Phone (Include Area Code)		Work Phone (Include Area Code)						
Work Location				Present Position								
				<input type="checkbox"/> FLSA Exempt		<input type="checkbox"/> FLSA Non-Exempt						
Course Information												
Title				Number		Functional Area						
Approval												
Installation Head/Designee Printed Name				Date		Phone (Include Area Code)						
Signature				<input type="checkbox"/> Training Approved as Compensable		<input type="checkbox"/> Training Approved as Non-compensable						
Training Progress												
19 ____		Module	Time			Check (✓)		Score		Initials		Remarks
Mo.	Date		Start	Finish	Total Hours	On Clock	Off Clock	Pre-test	Post-test	Em- ployee	In- structor	
Employee Signature				Authorized Time		Date Completed						
				Date Form 1734 Issued		Date Terminated						
				Date Form 2548 Annotated								
Supervisor Signature				Date of Certificate								

PS Form 2432, August 1987

Exhibit 121.4b
Form 2548, Individual Training Record

U.S. POSTAL SERVICE INDIVIDUAL TRAINING RECORD								
OCC Code <i>2315-04XX</i>	Salary Level <i>PS 5</i>	Position No. <i>-</i>	Position Title(s) DISTRIBUTION CLERK					
Employee's Name <i>DOE, JOHN R</i>		Date Entered on Duty <i>02-10-90</i>	DES/ACT Code <i>11-0</i>		Social Security Number <i>123-45-6789</i>			
TRAINING REQUIREMENT*	Check Tng. Needs	REQUIRED INSTRUCTION GIVEN**		ADDITIONAL TRAINING PROVIDED		Employee's Signature and Date	Supervisor's Signature and Date	Remarks
		Administrator's Signature and Date	Tng. Time Used	Administrator's Signature and Date	Tng. Time Used			
A. POSTAL ORIENTATION	✓	<i>A. Brown</i> <i>2/12/90</i>	<i>6:00</i>			<i>J.R. Doe</i> <i>2/12/90</i>	<i>M. Smith</i> <i>2/12/90</i>	
B. CRAFT BASICS	✓	<i>A. Brown</i> <i>2/13/90</i>	<i>6:00</i>			<i>J.R. Doe</i> <i>2/13/90</i>	<i>M. Smith</i> <i>2/13/90</i>	
C. CRAFT SKILLS BUILDING	✓							
1. Duties and Responsibilities	✓							
2. Safety and Emergency Procedures	✓							
3. Distribution Procedures	✓							
4. Service Fundamentals	✓							
5. Outgoing Mail Preparation-- Staging, Dumping, and Culling	✓							
6. Outgoing Mail Preparation--Hand Canceling	✓							
7. Outgoing Distribution-- Letters	✓							
8. Outgoing Distribution--Flats	✓							
9. Outgoing Dispatch Procedure	✓							
10. Incoming Mail--Transit Opening Unit	✓							
11. Incoming Distribution--Letters	✓							
12. Incoming Distribution--Flats	✓							
13. Incoming Distribution and Dispatch--Parcels	✓							
14. Registered Mail Service	✓							
15. Scheme Orientation--Manual	✓	<i>A. Brown</i> <i>2/20/90</i>	<i>2:00</i>			<i>J.R. Doe</i> <i>2/20/90</i>	<i>M. Smith</i> <i>2/20/90</i>	
16. Scheme Training--Manual	✓	<i>A. Brown</i> <i>2/4/90</i>	<i>30:00</i>			<i>J.R. Doe</i> <i>2/4/90</i>	<i>M. Smith</i> <i>2/4/90</i>	
17. Scheme Change Training--Manual								
D. CAREER BASICS								
Continued on back								
*If total training requirement is not completed, list topics covered on the reverse side. **When applicable, instructor should note under "Remarks" that additional training is needed.								

PS Form 2548-04, June 1989

122 **Scheme Study at Installations Without a PEDC**

Although only a small fraction of the total installations actually houses a PEDC, every postal installation falls within the service area of a PEDC. Training personnel must conduct scheme training according to the guidelines contained in this handbook regardless of whether this training is conducted in an installation housing a PEDC or in a non-PEDC facility.

130 Selection of Training Areas

131 **Scheme Training Space**

131.1 **Availability.** Scheme training space conducive to learning will be made available wherever scheme training is to be provided, whether in a PEDC or in any other postal facility. This training area could be an office or any quiet area of the post office where a trainee can study efficiently and productively. The following guidelines apply to the selection of scheme training space in any type of facility.

131.2 **Characteristics**

131.3 **Primary Considerations.** Major factors to consider in designating a scheme training room are the size of the room, lighting, ventilation, and noise level.

131.4 **Room Dimensions.** The scheme training room should be large enough to accommodate the anticipated number of trainees — during either group orientation or individual study. Overcrowding can be a serious problem during individual study and case practice. Trainees who are closely grouped together may hamper one another's casing motion or distract each other by conversation. Instructor discussion with individual students could also distract nearby trainees.

131.5 **Partitions.** Sometimes it is desirable to partition a large room into small training areas. This technique is especially useful when different schemes are being studied at the same time. Such an arrangement permits maximum use of space, while avoiding the problem of two instructors speaking to trainees in the same open room.

132 **Multiple-Use Facilities**

Scheme training should not be conducted in rooms where obvious distractions are present. For example, no scheme training should be conducted in employees wing/break rooms.

140 Training Materials

141 **Noncomputerized Training – On-the Clock Use**

141.1 **Practice Case.** Each trainee will perform practice distribution on either a miniature or a standard size distribution case. Trainees will not be required to alternate from one type of case to another during the training.

141.2 **Practice Cards**

141.21 **Description.** On the reverse side of the study card, the correct separation for that study item – SCF, ZIP Code, or carrier number will be indicated (see [Exhibit 141.21](#), *Preparation of Scheme Study Cards*). Depending upon the type of practice case used, the card size will be 3 x 5 inches (standard size case) or a minimum of 1 3/4 x 3 inches to a maximum of 2 x 3 3/4 inches (miniature case).

141.22 **Procurement.** Blank scheme study cards in either size can be ordered from the local label printing unit. The Topeka Materiel Distribution Center, Label Printing Division, Topeka, Kansas 66624-9502 will supply only pre-addressed miniature cards.

141.3 **Other Manual Scheme Training Materials.**

All other materials necessary to most effectively accomplish scheme training must be available for use in the training program. These may include, but are not limited to, pencils, maps, paper, carrier listings, street listings, lists of scheme items, flash cards, etc.

142 **Computer-Assisted Scheme Training (CAST)**

CAST is optional for employees on the rolls prior to September 24, 1988. See chapter [4](#) for details.

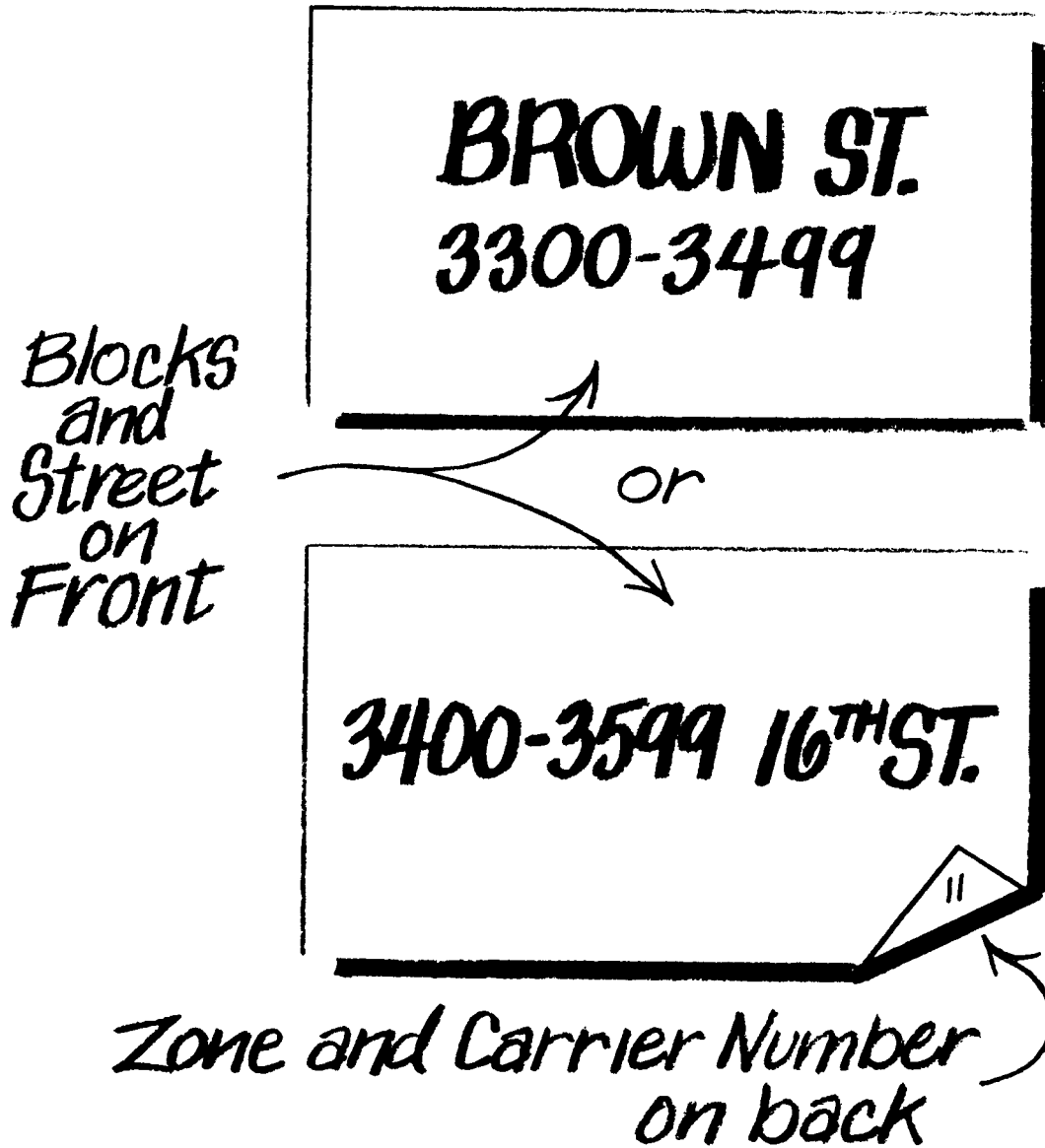
143 **Scheme Training Materials – Off-the-Clock Use**

143.1 **Senior Bidder.** Upon request, only a senior bidder who voluntarily bids for a preferred duty assignment will be authorized access to the PEDC or other training facility for off-the-clock scheme study. Maps, carrier listings, and scheme listings should be available for use during off-the-clock scheme study.

143.2 **Other Employees (for exception, see [235](#) Part-Time Flexible Preference).** Do not permit employees other than senior bidders to have access to scheme training materials off-the-clock. Deny all requests for off-the-clock use of materials except those identified in [143.1](#). The only exception to be made would involve training present employees when technological and/or mechanization/automation changes are initially made in an office.

Exhibit 141.21
Preparation of Scheme Study Cards

THE SCHEME CARD



150 Scheduling Training

151 **PEDC Staff Responsibilities**

- 151.1 **Criteria Used.** The PEDC staff determines the training schedule by the number of employees to be trained, available training space, and available training personnel.
- 151.2 **Coordination.** The PEDC staff must coordinate the training schedule with functional area management. Notify each trainee and appropriate supervisor of the time and location of each training session.

152 **Number of Trainees**

- 152.1 **Scheme Orientation.** Schedule scheme orientation to include as many trainees as possible at the same time. This allows instructors to make efficient use of time, instructional materials, training aids, and techniques that are effective for group instruction. Schedule scheme orientation for one 2-hour session.

152.2 **Training Classes**

- 152.21 **Size.** Schedule classes so that they are small enough to allow individual attention to trainees, yet large enough to promote efficient use of training aids and instructor's time. Classes of 5 to 10 trainees per instructor are recommended.

152.22 **Scheduling Trainees**

- 152.221 Scheme training will be scheduled for a minimum of 5 days each week.
- 152.222 The only exceptions are: (1) if an employee is off on leave or holiday and (2) if a PTF is scheduled to work for less than 5 days. If either of these exceptions exists, attempts should be made to schedule multi-training sessions to maintain the completion schedule.
- 152.223 Annotate on Form 2432 a trainee's reasons for nonattendance. The deferment period as established by the National Agreement will not be extended.
- 152.224 If the PEDC staff is not available, use an ad hoc certified instructor (e.g., supervisor, distribution/review clerk, etc.) to meet this requirement.

153 **Hours of Training**

- 153.1 **Optimum Time.** For best results, scheme training should be held at a time when trainees are mentally alert and capable of maximum concentration. The most desirable time for training is during the first half of a trainee's tour of duty.

153.2 **Length of Sessions**

- 153.21 **Optimum Length.** The optimum length for a training session is 1 hour with 1/2 hours being the maximum.
- 153.22 **Multiple Daily Sessions.** When trainees are scheduled for multiple daily sessions, they will be limited to two 1-hour sessions in a single workday.

Space the sessions so that the trainee will have a sufficient break to become mentally refreshed before the second session.

- 153.3 **Senior Bidders.** Senior bidders who elect training hour's outside-of-schedule have the option to train immediately before or immediately after regular work hours on scheduled workdays.

154 **Facilities, Materials, and Instructional Assistance**

- 154.1 **Requirements.** Scheme training facilities, materials, and instructional assistance must be made available for all scheduled scheme training.
- 154.2 **Compliance.** Training or designated training personnel at PEDC or non-PEDC facilities must comply with the requirements for providing facility, materials, and instructional assistance for all scheduled training.
- 154.3 **Responsibility.** The Manager/Supervisor, Training, ensures that the instructors are available to assist trainees during all scheduled scheme training. Instructors may be members of the PEDC staff or other certified individuals.

155 **Scheme Training Sequence**

155.1 **Manual Schemes**

- 155.11 **Completion for Single Scheme.** Employees who are assigned a manual scheme must complete all required training, testing, and qualification before they begin training for any additional manual or machine scheme.
- 155.12 **Completion for Multiple Schemes.** Employees who are assigned multiple schemes must complete all required training, testing, and qualification on the first scheme before they begin on the second scheme.
- 155.13 **Completion of Two Training Requirements.** In any bid job with two training requirements (e.g., manual scheme and window service training), the manual phase of training should always occur first.

155.2 **Machine Schemes**

- 155.21 **Sequence of Manual and Keyboard Training.** Employees who are assigned schemes for machine distribution must complete manual scheme training, testing, and qualification before they begin keyboard training. See [232.2](#) in Handbook PO-405 T, *Operator Training for Sorting Machines*.
- 155.22 **Multiple Schemes.** Employees who are assigned multiple schemes for machine distribution must complete both manual and keyboard training on the first scheme before starting on the second.
- 155.23 **Sequence for Multiple Schemes.** Employees who are assigned multiple schemes for machine distribution will be provided the following sequence of training:
- a. 1st manual scheme deferment; then
 - b. scheme to machine deferment; then
 - c. 2nd manual scheme deferment; then
 - d. scheme to machine deferment.

- 155.3 **Senior Bidder.** If an employee training for a preferred duty assignment (having previously been identified as the senior bidder) is designated as senior or successful bidder on a subsequent posting during the deferment period, the training and the deferment period for the first bid is terminated; and, for purposes of determining Live Record (if applicable), the date of the subsequent (second) bid must be used.

160 Part-Time Flexible Preference

Part-time flexible employees who are being converted to full-time may exercise a preference as to duty assignment. See [235](#) for additional information.

2 Scheme Assignment, Training, and Qualification

210 Schemes

211 **Definition**

A scheme is a systematic plan for the distribution of mail to its destination as determined by the mail processing functional area. Schemes are constructed of items that consist of a single set of address and routing information (e.g., Adair Street, 100-199 to Carrier 12.)

212 **Size**

Schemes are limited to a maximum of 1000 scheme items. Normally, schemes consist of one delivery zone. However, two or more delivery zones can be combined into a single scheme, providing (1) the mail is normally worked commingled on a single case and (2) the resulting scheme does not exceed 1000items.

213 **Memory Items**

213.1 **Manual Training**

213.11 **Definition.** Memory items are distributions which are 99 items or less. As such, they do not qualify as a scheme with the attendant study times, but rather are learned in productive distribution, at the applicable cases.

213.12 **Example.** A typical example of memory items, as they apply to manual schemes, would be a small associate office with 80 scheme items. These memory items would be learned at the case by productive distribution.

213.2 **Machine Training**

213.21 **Definition.** Generally, memory items are the machine equivalents of the firm holdouts, P.O. box sections, rural routes, etc.

213.22 **Scope.** Due to the different sorting capabilities of machine distributions, these items can now be sorted using unique key codes. If the assigned, bid, preferred job has machine duties, then these machine memory items are taught (with appropriate additional study times) to be keyed to machine bins using these unique key codes. These items are taught after successful completion of the proper manual schemes (see [155.23](#)) but prior to the applicable machine application of that scheme. The study time for these

items is in addition to the allowed time for machine application and is calculated at the rate of 1 hour/16 items, with 4 minutes for residual items.

- 213.23 **Limits.** As in manual scheme training, machine applications limit memory items to a maximum of 99 items.

220 Scheme Assignments

221 **30-Hour Rule**

Employees are assigned schemes only when there is a demonstrated need for scheme knowledge to process the mail as determined by the operations unit. Scheme assignments may be made when management has a reasonable expectation that employees will work a scheme for at least 30 hours within an accounting period. Trainees should be assigned to work their schemes soon after qualifying and on a regular basis to maintain proficiency and to meet the 30-hour rule.

222 **Employee Assignments.**

Normally, an employee should be assigned no more than two schemes or scheme sections.

The Regional Director, Operations Support, may approve the assignment of more than two schemes or scheme sections if operational requirements warrant such an assignment. Copies of the approval must be sent to the APMG, Delivery, Distribution and Transportation, at Headquarters.

230 Scheme Training

231 **Requirements**

- 231.1 **On-Site.** All scheme training provided to employees must be accomplished on postal premises, except when precluded by operational considerations.

- 231.2 **Compliance.** All training and subsequent testing must be in compliance with the instructions in this handbook. Trainees should learn schemes in the manner they will be required to distribute the schemes on the workroom floor.

Note: Trainees should not be assigned combined delivery zones if the scheme is worked on separate cases on the workroom floor.

232 **Instructors**

- 232.1 **Qualifications.** Training must be organized and controlled. All scheme instructors (a) must know scheme distribution and the instruction techniques and (b) must be able to motivate the trainees in their efforts to learn and qualify on their respective assigned schemes.

- 232.2 **New Instructors.** New scheme instructors must receive job instructor training by completing Job Instructor Training Program #21505-00.

233 **Scheme Orientation**

233.1 **Provision.** This phase of scheme training is provided only for an employee's initial scheme assignment. If the employee's initial scheme assignment resulted from his or her voluntary bid for a preferred duty assignment, scheme orientation is authorized as part of the scheme training, testing, and qualifying time.

233.2 **Topics Covered**

233.21 Learning Scheme and Scheme Distribution.

Scheme orientation is designed to teach the trainee how to learn a scheme and the techniques of scheme distribution. The areas covered during orientation include, but are not limited to, the following:

- a. Proper use of training materials.
- b. Scheme content.
- c. Scheme function in the distribution process.
- d. How to case mail.
- e. Training schedule.
- f. Explanation of option and procedures for using the Computer-Assisted Scheme Training (CAST) System (see chapter [4](#) for additional information).

233.22 **Study Time and Requirements.** In addition to the above topics, all employees must be advised of the following:

- a. The allotted study time and the requirement that they successfully complete their training program within the prescribed study time (see [235.1](#) for allotted study hours). Under no circumstances will trainees be permitted voluntary supplemental study time to complete the training program.
- b. That failure to meet the requirements of the training program may result in the loss of the preferred bid, separation during probation, reassignment, or discipline up to and including discharge, depending on the trainee's employment status.

233.3 **Visual Aids.** Orientation instructors should use visual aids and encourage trainees to ask questions. Typical aids include flash cards, chalkboards, maps, charts, etc.

234 **Scheme Study**

234.1 **General Approach.** Following orientation, the training program provides for instructional assistance and study of scheme items. The trainee, with assistance from the instructor, follows a systematic method of study while learning the required scheme items. Ordinarily the trainee will study alone using one or a combination of several study procedures listed in chapter [3](#) of this handbook. However, instructor assistance is provided when either requested by the trainee or determined necessary by the instructor.

234.2 **Study Materials.** Scheme training cards, scheme books, and other materials are property of the Postal Service and must not leave the study area.

235 Study Time

235.1 **Hours Allotted — All Employees.** Study time is provided at rate of 1 hour for each 16 items or, for increments of less than 16 items, 4 minutes per item.

235.2 Scheduling

235.21 New Employees

235.211 All scheme training must be accomplished during regular working hours, except when taken by a senior bidder or part-time flexible clerks as a result of an expressed preference (see [235.22](#) and [235.23](#)).

235.212 To the extent possible, the training program is scheduled to ensure sufficient time for a new employee to qualify at least 7 days prior to completion of the probationary period.

235.22 **Senior Bidders.** The training program for employees bidding on scheme duty assignments should be scheduled to ensure sufficient time for the employees to qualify prior to completion of the deferment period. Only the senior bidder on a preferred duty assignment may request off-the-clock study time. Employees identified as senior bidders for preferred duty assignments which require scheme knowledge may choose one of the following alternatives for acquiring requisite scheme knowledge:

a. **Alternative I — Annual Leave.**

A senior bidder who has a sufficient annual leave balance to cover allotted Scheme Training, Testing, and Qualifying (STTQ) time and any related compensable travel time may elect to take annual leave. This alternative can be used only on the employee's regularly scheduled workdays.

b. **Alternative II — Hours Outside of Schedule.**

Senior bidders may elect to enter into STTQ outside their regularly scheduled work hours. This alternative can be used only on the employees' regularly scheduled workdays.

235.221 **Choosing An Alternative.** Each employee identified as a senior bidder must be informed of the scheme training alternatives. Employees select the desired alternative by completing the appropriate portion of Form 8078, *STTQ Memorandum* ([Exhibit 235.221](#)), in duplicate and submitting it to their immediate supervisor for concurrence. The supervisor must coordinate with the PEDC to allow scheduling in the training facility. The immediate supervisor will complete the remainder of the STTQ Memorandum, return the duplicate to the employee, and submit the original to the timekeeping unit. The senior bidder must present a copy of the STTQ Memorandum to the PEDC or other training facility within 10 calendar days. The following provision and restriction is applicable:

a. Senior bidders who elect Alternative I but have exhausted their annual leave balance prior to completion of the STTQ are allowed to complete STTQ outside of their regular work schedule.

b. Senior bidders who elect Alternative II cannot later change to Alternative I.

Exhibit 235.221

Form 8078, Scheme Study, Training, Testing, and Qualifying (STTQ) Memorandum (p. 1)



Scheme Study, Training, Testing, and Qualifying (STTQ) Memorandum

I. Employee's Request

1. To: _____
(Supervisor's name)
 2. I, _____, _____
(Employee's name) (Employee's Social Security number)
request to engage in scheme study, training, testing, and qualifying
 3. at the _____ PEDC,
(City)
 4. from _____ a.m. p.m. until _____ a.m. p.m., commencing on _____
(Hour) (Hour) (Month / day / year)
 5. I am employed at _____, where my regular tour is
(Duty station and/or Post office)
 6. from _____ a.m. p.m. to _____ a.m. p.m.,
(Hour tour begins) (Hour tour ends)
 7. and my days off are _____ and _____
(Day of week) (Day of week)
 8. I have elected the _____ alternative.
(Annual leave or Hours outside of schedule)
 9. I understand I am allowed _____ hours for scheme study which must be completed within the
(Number) deferment period.
 10. I have read and I understand all the provisions of the Privacy Act Statement as found on the reverse side of this memorandum (Part III).
- _____
(Employee's signature) (Date)

II. Supervisor's Authorization

1. I agree with the study time periods requested above; and if the annual leave alternative is elected, I certify the availability of sufficient annual leave; and if compensable travel is involved, I authorize _____ travel time for each training session.
(Number of hours and / or minutes)
2. _____
(Supervisor's signature) (Date)

PS Form 8078, May 1990

ORIGINAL — Timekeeping / PSDS COPY — Employee

Exhibit 235.221

Form 8078, Scheme Study, Training, Testing, and Qualifying (STTQ) Memorandum (p. 2)

III. Privacy Act Statement

The collection of this information is authorized by 39 USC 401 and 1003. This information will be used to compensate employees who bid for and complete scheme study, training, testing, and qualifying.

As a routine use, this information may be disclosed to a congressional office at your request; to OMB for review of private relief legislation; to a labor organization as required by the NLRA; where pertinent, in a legal proceeding to which the USPS is a party; to an appropriate law enforcement agency for investigative or prosecutorial purposes; to a government agency where relevant to a hiring, contracting, or licensing decision by the requesting agency; to a government agency in order to elicit information relevant to a hiring, contracting, or licensing decision by the USPS; to an expert or consultant under contract with the USPS to fulfill an agency function; to the Federal Records Center for storage; to the EEOC for investigating a formal EEO complaint filed against the USPS under 29 CFR 1613; to the Merit Systems Protection Board or Office of Special Counsel for proceedings involving possible prohibited personnel practices; to an independent certified public accountant during an official audit of USPS finances; to agencies having taxing authority for taxing purposes; to financial organizations receiving allotments; to OPM, SSA, VA, OWCP, insurance carriers, plans, or other program management agencies or systems for use in determining or processing a claim for health, life insurance, retirement, or other program benefits under such system; to OPM for its active employee/annuitant data system used to analyze federal retirement and insurance costs; and to federal, state, or local governments administering benefit or other programs to conduct a computer match to verify eligibility, indebtedness, or compliance with requirements of the program. Completion of this form is voluntary. However, if this information is not provided, scheme training may not be granted.

PS Form 8078, May 1990 (Reverse)

235.222 **Exception.** Employees who have (a) received written notice of planned abolishment of present duty assignment; (b) failed to retain a duty assignment due to posting; or (c) been involuntarily reassigned have the option of receiving training on-the-clock for only the first bid after one of the actions in (a)-(c) has occurred. Any subsequent bids regardless of whether employees completed the training for the first bid will fall under the guidelines for senior bidders.

235.23 **Part-Time Flexible Preference.**

Part-time clerks who receive voluntary scheme training as a result of an expressed preference are scheduled and compensated on the same basis as a full-time employee who is a senior bidder on a preferred assignment. See [235.22](#) and [264](#).

235.3 **Deferment Periods.** When the duty assignment requires scheme knowledge, if the senior bidder is not qualified on the essential scheme requirements when the posting period is closed, permanent filling of the preferred assignment is deferred until the employee is qualified on the essential scheme requirements. The deferment period begins the date the senior bidder is scheduled to report for training and is computed based on the following:

- a. 100-800 total items in the scheme or combination of schemes — 7 calendar days for each 80 scheme items, plus 3 calendar days per scheme.
- b. 801-960 total items in the scheme or combination of schemes — 7 calendar days for each 96 scheme items, plus 3 calendar days per scheme.
- c. 961-2,000 total items in the scheme or combination of schemes — 7 calendar days for each 120 scheme items, plus 3 calendar days per scheme.

236 **Weekly Scheme Reviews — (see chapter 4 for CAST Review)**

236.1 **Purpose.** Scheme instructors conduct weekly reviews to monitor the trainees' progress. These reviews provide the instructor with information on a weekly basis concerning each trainee's progress (i.e., the trainees' ability to learn the required items during a specific time frame).

236.2 **Scope.** All trainees who are studying a manual scheme receive the weekly reviews.

236.3 **Administration**

236.31 **Time Allotted.** Time for taking weekly reviews is in addition to the allotted study time. Weekly review time is determined by allowing 4.8 seconds for each review item (if less than 100 cards) but no more than 8 minutes (100-card deck).

236.32 **Review Decks.** Reviews are given with random decks not to exceed 100 cards. To facilitate and expedite the administration and more accurately reflect the actual progress of the trainee, the training official may use the decks presently being utilized for the final qualification test in order to

administer the weekly reviews. On the trainee's scheduled weekly review day, the instructor will randomly select one of the decks from the secured area which contains all of the randomly constructed decks of that scheme (see 244 for test deck construction procedures). The respective deck used by the trainee in these weekly reviews should be annotated on Form 2432 so that subsequent reviews will not use the same deck.

- 236.33 **Coding.** A code should be used to represent the correct distribution on the back of the review/test cards. One recommended code is H-O-S-P-I-T-A-B-L-E for 0 1 2 3 4 5 6 7 8 9. For example, XHO = carrier route 01, LSE = carrier route 29 where the first character is always a dummy character.
- 236.34 **Review Cases.** Reviews are to be given on the same type of case (standard or miniature) used for training. Trainee cases are set up to reflect actual separations used during distribution. This will assist the instructor in monitoring trainee progress and indicate when the trainee is accurately distributing 75 percent of the scheme items by volume.
- 236.4 **Review Results.** The instructor must record the results of weekly reviews on the trainee's Form 2432.

237 Consultations

The weekly review is not the only vehicle a scheme instructor has for monitoring a trainee's progress during scheme training. After each weekly review, the instructor should talk to the trainee concerning the trainee's progress. The instructor observes the trainee's study habits to determine forth trainee could make better use of study time. Time spent discussing the weekly review results and other training factors is in addition to the allotted scheme study time and is noted on Form 2432 as part of weekly review/test time.

238 Special Instructional Assistance

- 238.1 **Purpose.** The basic purpose of special assistance is to help the trainees overcome problems in learning a scheme and to qualify them as distribution clerks. The instructor must act to identify and correct problem situations before they become serious.
- 238.2 **Consultation.** When a need for special assistance is identified, first, put the trainees at ease; then remind them that this help is offered for their benefit. Stress that other employees have experienced comparable problems but have gone on to complete the study successfully. Careful analysis is needed to determine why a trainee is not progressing satisfactorily. The problem may be poor motivation, poor study habits, or lack of experience in organized study. The trainee should be questioned on these points and given the opportunity to discuss the situation.
- 238.3 **Finding the Solution**
- 238.31 **Improving Use of Study Time.** The next step is to work out a possible solution to the problem. Frequently, the solution will be to improve the trainee's use of study time.
- 238.32 **Importance of Organized Study.** If the trainee has had little experience with formal study, stress the importance of organized study, studying small

units during each training session, and the benefits of repetition. The benefit of CAST (structure, organization, item maintenance, and presentation) could be presented at this point. Discuss alternative study methods and encourage the trainee to try various techniques. Emphasize that persistence pays off and that some employees who have difficulty while learning a scheme make excellent distributors once they have passed the scheme examinations.

238.33 **Discussion Time.** This discussion time is in addition to the allotted scheme study time and is noted on Form 2432 under weekly review/test time.

239 **Productive Scheme Distribution**

239.1 **Proficiency Requirements**

239.11 **Productive Scheme Distribution.** Where operationally feasible, productive scheme distribution will be provided as part of the scheme training process. That is, the trainee will be placed in a productive work setting actually distributing live mail on the scheme being studied.

239.12 **PTFs.** Productive scheme distribution will be initiated when a PTF trainee who has been assigned a scheme is proficient enough to accurately distribute at least 75 percent of the scheme items by density.

239.13 **Senior Bidder.** When the senior bidder completes 80 percent or more of the allotted training time for scheme qualification, the employee will have the opportunity to be tested on the items studied. This test may be taken at the option of the employee.

239.131 A senior bidder who scores at least 90 percent on the above test may request assignment to productive distribution during the remainder of the deferment period. Such requests, including a voluntary request for a change in schedule in order to provide such productive distribution, will be granted if operationally feasible.

239.132 This test is taken only for the purpose of being assigned to productive distribution and does not count as an attempt to qualify. Employees will be afforded the same opportunities for scheme qualifications as those established in the 1984-1987 National Agreement.

239.2 **Notifications.** The Manager/Supervisor, Training, or designee, sends a notice to the appropriate operating official when a trainee is qualified for productive distribution.

239.3 **Time Allotted**

239.31 **May Vary.** The amount of productive scheme distribution time provided may vary depending on the availability of mail, dispatch deadlines, and other operational considerations. Where provided, productive scheme distribution time is in addition to the allotted scheme study time and is charged to the mail processing operation.

239.32 **Not Recorded.** Productive scheme distribution time is not recorded. Although no written record is required for productive scheme distribution, operation officials should provide training personnel with feedback on the difficulties encountered by trainees so that necessary assistance can be provided.

- 239.33 **Appropriate Visual Aids.** Provide appropriate visual aids during this period of productive distribution.
- 239.34 **Transition Between Phases.** In an effort to reduce and/or eliminate any delay between this manual phase and machine phase of training, if productive distribution is initiated at this point (assigned PTFs), the 20-hour productive distribution requirement outlined in [242.2](#) may begin at this training benchmark.

240 Scheme Qualification

241 **Qualification Standards (see chapter 4 for CAST)**

To pass a scheme examination, trainees are required to correctly sort 95percent or more of a 100-card test deck in 8 minutes or less. When the examiner calls time, trainees must stop immediately and surrender the case and all uncased cards.

242 **Scheduling Examinations**

- 242.1 **Assigned Schemes.** Employees will be required to qualify on their assigned scheme on their first workday following completion of the final training session of their study plan. Time for the scheme qualification examination will be on-the-clock and in addition to that time allocated for scheme study.
- 242.2 **Productive Distribution.** After trainees qualify on the manual scheme, they should be allotted a minimum of 20 hours of manual scheme distribution before they begin the machine training. This will provide trainees an opportunity to become familiar with the scheme and help them achieve rapid recognition of scheme items. No out-of-schedule pay will be incurred in an effort to provide trainees 20 hours of manual scheme distribution.
- 242.3 **Senior Bidder.** Senior bidders are required to qualify on their bid by the end of their deferment period as established in Article 37.3.F.3a of the National Agreement. Both early attempts and the final qualification test must be administered prior to the expiration of the established deferment period. Neither additional qualification tests nor additional time will be allowed upon expiration of this deferment period. In the case of senior bidders, the qualification examination is normally given off-the-clock, unless proctoring is available only during the employee's regular work hours. In those cases, the examination will be given on-the-clock.

243 **Early Attempts**

- 243.1 **Senior Bidders and Assigned Employees.** Upon request, trainees (senior bidders or assigned employees) are allowed a maximum of two attempts to qualify prior to the required examination date.

244 **Test Deck (see chapter 4 for CAST System)**

Schemes are divided into as many possible representative decks of 100 cards each. For example, if the assigned scheme consists of 991 cards, nine different groups of 100 cards each are assembled for examination purposes.

The training official must shuffle the test deck before giving it to the trainee. Test decks must consist of representative items; no deck should consist of a disproportionate number of difficult items.

245 **Examination Cases**

245.1 **Type.** Use either standard or miniature cases for examination purposes (the same as those used during training).

245.2 **Case Separations.** Separations to be made on the examination case must reflect separations made during actual distribution. There will be a separation on the examination case in which each recognized scheme item may be placed.

245.3 **Withdrawing Miscased Cards.** Trainees may withdraw a miscased card immediately and recase it prior to casing any other card; however, under no circumstances are trainees allowed to examine any previously cased cards in order to detect errors.

246 **Recording Examination Results**

Training officials must record all qualification examination results on Form 2432, *Individual Training Progress Record* and Form 2548, *Individual Training Record*.

247 **Scheme Examination Failures**

Trainees who fail the final qualification examination are either disqualified, reassigned, or discharged by management, as circumstances warrant, consistent with the provisions of the National Agreement. The following applies:

- a. Any employee who is disqualified because he or she fails to qualify on a voluntary bid remains in the present duty assignment.
- b. When termination is proposed for a probationary or non probationary employee and the employee qualifies before the effective date of the termination, the termination action is rescinded, and the employee is deemed qualified. The trainee may attempt to qualify no more than once each scheduled workday during the period when termination procedures are in effect.

250 On-the-Job Instruction

After qualifying on the scheme, trainees are assigned to an on-the-job instructor who continues instruction in accordance with procedures in Handbook EL-701A, *New Employee Training for Non Maintenance Employees*, for on-the-job training. In situations where productive scheme distribution is authorized, on-the-job instruction is given when the trainee is assigned to productive distribution. The trainee's supervisor should use the sample checklist in Exhibit 250, Training Evaluation Checklist, to evaluate the individual's on-the-job performance to determine if additional instruction is needed.

Exhibit 250

Training Evaluation Checklist

Training Evaluation Checklist		
Employee Name: _____		
Operation Number: _____		
	Satisfactory	Needs More Training
1. Uses rest bar properly		
2. Proper location in relation to distribution case		
3. Mail ledged in proper orientation		
4. Holds mail properly		
5. Recalls scheme without having to refer to scheme book or other aids frequently, and knows all holdouts on case		
6. Holds letters not known until tray has been distributed, then looks up unknown letters		
7. Rate of distribution		
8. Received on-the-job instruction in accordance with Handbook EL-701A		
9. Uses acceptable sweeping technique		
10. Passes proficiency check.		
 Supervisor signature/date		 Employee signature/date
 Comments:		

260 Timekeeping Procedures and Compensation

261 **Scope**

The following procedures apply only to senior bidders and part-time flexible employees who selected a job preference.

262 **Timecard Offices**

262.1 **References.** Detailed timekeeping procedures for these offices are included in Handbook F-21, *Time and Attendance*.

262.2 **Documents.** Record all time spent on scheme training, testing, and qualifying (plus compensable travel time) on Form 1234, *Utility Card*; trainees must bring this form to each session. Time clocks, if available, are used for clock ring entries. If clocks are not available, the Manager/Supervisor, Training (or designated instructor), enters the clock rings. In both cases, the Manager/Supervisor, Training (or designated instructor), must certify the daily entries by initialing the appropriate block. Trainees must return Forms 1234 to the timekeeping unit daily.

263 **Postal Source Data System (PSDS) Offices**

263.1 **References.** Detailed timekeeping procedures for these offices are included in Handbook F-22, *PSDS Time and Attendance*.

263.2 **Documents.** Record all time spent on scheme training, testing, and qualifying (plus compensable travel time) on Form 1260, *Non-transacter Card*. The Manager/Supervisor, Training (or designated instructor), enters the clock rings. Manager/Supervisor, Training (or designated instructor), must verify such entries by signing the signature block on the Form 1260. Trainees must return Forms 1260 to the timekeeping unit daily.

264 **Employee Compensation**

264.1 **Requirements.** All scheme training must be taken on-the-clock during regular working hours, except when taken by a senior bidder or a part-time flexible employee who selected a job preference.

264.2 **Senior Bidders/PTF Preference**

264.21 **Alternative I**

264.211 **Employees Who Qualify.** Employees who (a) elect Alternative I — annual leave for STTQ and related compensable travel time, (b) pass all required examinations, and (c) accept the position will have annual leave converted to hours worked and be recredited with a like number of annual leave hours.

264.212 **Failure to Qualify.** Employees who elect Alternative I — annual leave for STTQ — but fail to qualify or fail to accept the position will not have annual leave re credited.

264.22 **Alternative II**

264.221 **Employees Who Qualify.** Employees who (a) elect Alternative II — hours outside of schedule for STTQ and related compensable travel time, (b) pass

all required examinations, and (c) accept the position will be compensated at the appropriate overtime rate.

- 264.222 **Failure to Qualify.** Employees who elect Alternative II — hours outside of schedule for STTQ — but fail to qualify or fail to accept the position will not be compensated for the STTQ time.
- 264.23 **Exception.** Compensation is made only if the senior bidder passes all of the required examinations and accepts the position, unless one of the following occurs:
- a. The training is terminated to correct a management error (e.g., when a trainee is erroneously identified as the senior bidder and is subsequently withdrawn from the training when the error is corrected).
 - b. The employee expresses a preference for machine training, successfully completes manual scheme training and qualifies, fails machine application and then receives a position which requires the identical manual scheme which has been successfully completed.
 - c. The employee enters machine training, completes the manual scheme training and qualifies; then prior to machine application, bids or is assigned to a manual distribution position which requires the identical manual scheme on which the employee qualified.
- 264.231 Upon accepting a position identified in (b) or (c) above and being compensated, the employee will be deemed to have a live record and, therefore, currently qualified on that qualification.
- 264.232 The determining factor in evaluating other possible examples would be whether compensation would be required under applicable FLSA regulations. Under no circumstances shall an employee be compensated twice for the same training.

270 Withdrawal From Training Program

271 **Senior Bidders**

If the senior bidder is not qualified on the required schemes and enters a deferment period, the trainee may withdraw at any time during the deferment period. If the bidder withdraws from the training program, the deferment period ends, and the duty assignment is filled in accordance with the National Agreement.

272 **PTF Preference**

Part-time flexible employees who express a preference may not withdraw from the assignment or training except as specifically provided for in Article 37.2.D.5.b3 of the National Agreement. Such employees may not express a preference for any other assignment while in training except for assignments for which they are currently qualified (Article 37.2.D.5.b1, National Agreement).

273 Assigned Employees

Employees who are assigned to scheme training cannot withdraw from the program.

280 Other Considerations

281 Absence From Scheme Operation

Manual or machine scheme employees who are absent from the scheme operation for an extended period of time due to illness/injury are not provided additional formal scheme training. Supervisors will ensure that these employees are afforded an adequate amount of time on the distribution case to regain their scheme proficiency. This is not to be confused with MPLSM operator retraining outlined in 383.2 in Handbook PO-405 T, *Operator Training for Sorting Machines*.

282 Live Record

Except as provided in Article 37.1.K.1 of the National Agreement, a full-time employee who occupied a bid assignment requiring qualifications within the 2 years prior to the posting of a vacant full-time assignment requiring the same qualifications will be deemed to have a live record and, therefore, is currently qualified on those qualifications. An unassigned full-time, full-time flexible, or part-time flexible employee who qualified on a particular skill requirement, (e.g., scheme, a keyboard at a specific speed, etc.) within 2 years prior to the posting of a vacant assignment requiring the same qualifications will be deemed to have a live record and, therefore, currently qualified on those qualifications.

283 Brush Up

283.1 Definition. Brush-up training is that training provided to a successful bidder on a duty assignment for which the employee is deemed to have a live record.

283.2 Manual Scheme. Brush-up training will be provided to employees with a live record on a manual scheme (manual separation of mail into a distribution case) as follows:

- a. Less than 90 days - none.
- b. 90 to 180 days - up to 60 calendar days productive distribution.
- c. 181 days to 2 years - up to 60 calendar days productive distribution plus up to 1 hour of study (brush-up) time for each 200 scheme items.

283.3 LSM Scheme. Brush-up training will be provided to employees with a live record on a letter sorting machine scheme application (manual scheme knowledge applied to machine distribution) as follows (manual only):

- a. Less than 90 days — none.
- b. 90 to 180 days — up to 10 hours productive distribution prior to keyboard brush-up training.

- c. 181 to 365 days — up to 12 hours productive distribution prior to keyboard brush-up training.
- d. 366 to 540 days — up to 16 hours productive distribution prior to keyboard brush-up training.
- e. 541 days to 2 years — up to 20 hours productive distribution prior to keyboard brush-up training.
- f. In addition to the above, up to 1 hour of study time for each 200 scheme items will be provided for (d) and (e).

290 Scheme Changes

291 **Fair Labor Standards Act (FLSA) Provision**

In no event are employees to be directed, encouraged, suffered, or permitted to study the change items off-the-clock.

292 **Posting Changes**

- 292.1 **Official Pistons.** Scheme changes are officially posted at the end of each Postal Service quarter.
- 292.2 **Unofficial Pistons.** Scheme changes may be unofficially posted prior to the end of the quarter.

293 **Productive Distribution of Scheme Changes**

- 293.1 **Minor Scheme Changes.** In general, minor scheme changes should be learned through productive distribution. Employees who have 32 or fewer scheme items within a Postal Service quarter are not scheduled for formal scheme training.
- 293.2 **Visual Aids.** Visual aids reflecting scheme changes must be posted at the cases to assist in the learning of changes through productive distribution.

294 **Formal Study of Scheme Changes**

- 294.1 **Manual Clerks.** When there are more than 32 scheme item changes, these employees must be scheduled for formal training.
- 294.2 **Others.** Formal scheme change training will be provided for:
 - a. All machine scheme distributors.
 - b. Manual scheme distributors who are not provided the opportunity to learn the scheme changes through productive distribution.
 - c. Certain manual distributors who fail two successive proficiency checks (see [294.32](#)).
 - d. If scheme changes have occurred during an applicable live record period, and an employee subsequently enters brush-up training and those scheme changes have exceeded 10 percent, then training will be provided.

294.3 Study Time

- 294.31 **General.** Scheme change item study time is provided at the rate of 1 hour for each 16 items or 4 minutes for any increment of less than 16 items. This applies to manual scheme training and the CAST system (see chapter 4). Exception: This does not apply to manual distribution clerks who fail two proficiency checks.
- 294.32 **Manual Distribution Clerks.** If those manual clerks who were supplied visual aids (productive distribution) in lieu of formal scheme change training have not demonstrated an acceptable retention rate as evidenced by the failure of two proficiency checks (see Handbook M-5, *Schemes: Construction, Assignment, Training, and Proficiency*, section 562), then all recent scheme change training items will be presented to the employee as a pre-test to determine what items will be given in formal (PEDC Classroom) study. The amount of training time is determined by the number of those items answered incorrectly x 4 minutes. The training will consist of only those scheme change items answered incorrectly.

294.4 Qualification Test

- 294.41 **General.** No qualification test is required for formal scheme change training. Formal scheme change training ends when either (1) the maximum allotted training time is exhausted, or (2) the employee elects to take a qualification test and passes the test by correctly sorting 95 percent or more of the cards in a test deck.
- 294.42 **At Employee's Request.** An employee may request a qualification test of the scheme changes before the study time is totally exhausted. If such a request is made, the following applies:
- a. The employee is given a test comprised of all the scheme changes.
 - b. The time allotted for the test is determined by allowing 4.8 seconds for each scheme item (e.g. 50 items x 4.8 seconds = 4 minutes).
 - c. The test can be administered only once during a particular scheme change training period.
 - d. An employee who elects to test on the CAST system for formal scheme change training is required to correctly sort 95 percent or more of the items randomly selected from the total pool of scheme change items.
 - e. If the employee does not attain a score of 95 percent, then the remainder of the allotted scheme change study time must be used.

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3 Training Motivation, Methods, and Aids

310 Motivation

311 General

312 Significance

Motivation is a very significant factor in employee training and should be a concern of all training personnel during their contact with postal employees. It starts on the day of orientation and ends with the successful application of the trainee's newly acquired skills. A positive attitude is linked both to the trainee's need not to feel threatened and to the following five factors called satisfiers:

- a. Achievement,
- b. Recognition,
- c. Responsibility,
- d. The work itself, and
- e. Advancement.

313 Improving the Trainee's Attitude

Since all employees learn at their own rate, a trainee who may be moving at a lower rate than others should not become discouraged. A positive attitude is as essential, or perhaps more so, for a slow learner as for a fast learner. Some suggestions for creating a positive attitude are:

- a. Be positive in your approach to trainees.
- b. Appeal to the pride in each employee to become a qualified distributor as soon as possible.
- c. Support the trainees. Recognize their progress on a daily basis so that they may recognize it themselves.
- d. Provide recognition for those trainees who perform in an outstanding manner, i.e., qualifying rapidly or making 100 percent on a qualifying examination.
- e. Instill pride in becoming part of the Postal Service. Let trainees know how important their work is to the organization and that the success of

the service we give our customers is linked to the satisfaction employees experience from their job each day.

- f. Let employees, particularly those who are new to the organization, know about their potential to move up in the organization if they so desire. Point out how their training and approach to their work will affect this.
- g. Be sure that trainees are made fully aware of what is expected of them and the consequences of failing to qualify on their assigned schemes. This awareness should not pose a threat to them if they are also made aware of their potential for success and the importance of a positive approach to their scheme assignment.

Note: Do not, however, provide incentive awards to employees for excellent training performance except as specifically authorized by USPS Headquarters policy (ELM 470).

320 Training Methods — Noncomputerized

321 Organizing and Presenting Scheme Items

321.1 Planning Lessons

321.11 **Meaningful Units.** It is easier to learn a scheme that has been broken down into meaningful units, such as ZIP Code or carrier route, than a scheme that is arranged alphabetically or numerically without regard to ZIP Code or geography.

321.12 **Lessons.** Lessons should reflect the meaningful units chosen for presentation to the trainees. As such, individual lessons may contain somewhat fewer or more items to be learned than would be called for on a strict 16 items per hour basis.

321.2 Constructing Lessons

321.21 **Goal.** When constructing lessons, use the most efficient method to teach the entire scheme within the study time allotted.

321.22 **Development.** Consider the following when developing lessons for a particular scheme:

- a. Number of items to be learned.
- b. Geographic location.
- c. Natural break points.

321.23 **Components.** Every scheme may be divided into components such as ZIP Code areas, sectional centers, associate offices, geographic areas, streets, avenues, and buildings or other units.

321.24 Density

321.241 When constructing lessons for primary schemes, use density based upon uncoded mail volume. (See 212 of Handbook M-5, *Schemes: Construction, Assignment, Training, and Proficiency.*)

- 321.242 When density is used to construct lessons, take care to incorporate the items (or carrier routes, in the case of a city secondary) with the greatest density (heaviest volume) into the first lesson, and those of decreasing density into subsequent lessons, in descending order.
- 321.243 For training in schemes constructed by density, i.e., state or city primary schemes, schemes items must be presented to trainees in order of their density within the scheme, highest density items first.
- 321.244 On the city secondary, the local office has the option of presenting schemes in alphabetical order, carrier route sequence, or density.

321.25 **Alphabetical Listings**

- 321.251 **Primary Schemes.** Even though primary schemes must be constructed according to density, lessons presented for the purpose of learning the scheme may be arranged alphabetically if this will significantly enhance the learning process. The alphabetical listing for a scheme will be in two groups – one for the items which comprise 75 percent of the uncoded mail volume for that scheme; and the other, for the remainder.
- 321.252 **Secondary Schemes.** Construct an alphabetical listing of scheme items by carrier route within a ZIP Code area by identifying the carrier route number of each item listed. Streets belonging to a carrier route are then arranged in alphabetical order. The following table gives an example of this type of listing:

Carrier Route 06	
Academy St.	100-499
Baker St.	
Eldridge Avenue	700-799

- 321.26 **Other Methods.** Other methods of organizing a scheme into lessons are the (a) number of street breaks, (b) number of ZIP Codes, (c) city layout, and (d) geographic features. Most schemes can be simplified for study purposes by using one or more of the methods described in this chapter.

322 **Basic Training Methods**

- 322.1 **Requirement.** Any system of scheme training requires a basic method (or strategy) of organizing and presenting scheme items (as described in [321](#)) so they can be learned in an orderly and progressive manner. The basic methods of teaching schemes, either by memorization, association, or any combination of the methods described in this chapter, apply to all types of formal scheme training.
- 322.2 **Types.** The two basic methods are:
 - a. Straight Memorization or Rote Method.
 - b. Association Method.
- 322.21 **Straight Memorization or Rote Method**
- 322.211 **Definition.** Rote, or straight memorization of scheme items, simply means to memorize an item and its correct distribution.
- 322.212 **Significance.** This is the primary means of study when the trainee studies a scheme alphabetically.

322.213 **Advantages.** The advantages of rote memorization are its simplicity and immediate applicability.

322.214 **Instructional Assistance.** The difficulty involved in learning several hundred apparently unrelated items may initially overwhelm the trainee. For this reason, scheme instructors must pay close attention to the trainee's attitude toward the assignment and impart only positive reinforcement of the trainee's ability and effort. When a large number of items is involved, it is highly recommended that you use other training methods in conjunction with the rote process. One of the more effective methods to use with rote is that of association.

322.22 **Association Method**

322.221 **Definition.** The association method simply means forming mental connections to help remember the scheme items.

322.222 **Use.** This method is recommended for particularly difficult scheme items or geographical areas.

322.223 **Grouping.** In the association method, the trainee examines a group of items to be learned and identifies what they have in common. This common feature is then used to tie the items together. For instance, a typical association might be that streets in a certain area have the names of flowers, states, generals, or presidents and that scheme items with these names go to one ZIP Code or carrier.

322.224 **Association by Ideas.** When using the association method, the possibilities are virtually unlimited. Below is an example of association by ideas.

Example: Zodiac Street is delivered by route 2722. Route 2722 is the highest numbered route in the unit, the last one of the number series. Z is the last letter of the alphabet. Zodiac and 2722 are associated by the idea that they are both last.

Note: Memory association handouts developed by the trainer may be provided to trainees on-the-clock based upon local determination of need.

322.225 **Story Association Method.** Using a scheme listing, a trainee creates a story to associate a series of names and numbers with a given separation.
Example: A trainee is learning route 2306. A segment of the scheme is listed in the table below:

Exhibit 322.225

Segment of a Scheme

Academy Ave	2328
Aiken Ave, N	2306
Aiken Ave, S	
5700-5999	2332
6000-6599	2306
Alderson St.	2317
Allegheny Way	
500-999	2333
1000-1299	2307
Amanda St.	2312

Apple Way	
6300-7299	2306
7300-7599	2312

Example: A possible story associated with the items in Table 2 is as follows:

Norman and Sam Aiken (N. Aiken Ave., S. Aiken Ave.) were in the middle (e.g., Middlesex Ave.) of a heated discussion about a number of trees and the fruit they produced. Norman contended that apples (Apple St.) could bear only 63 to 72 fruits. Sam said "Boulderdash" (Boulder St.*). Alders would yield 60 to 65 seeds per cluster (Custer St.*)."

* These additional scheme items (Boulder, Custer, and Middlesex) are assumed to appear later in the scheme listing and have been included to help illustrate how nonsense associations can sometimes be drawn to cement an idea in the memory.

330 Training Aids

331 Supply and Maintenance

All training materials are supplied by management and maintained on postal premises.

332 Materials

332.1 Maps

332.11 **Description.** Maps that are used as training aids should be color-coded and large enough to be read easily. Maps should contain all of the streets with starting and ending address numbers.

332.12 **Availability.** The maps should be readily available to trainees in their scheme study area.

332.13 Advantages

332.131 **Productive Distribution Areas.** Color-coded maps placed securely atop one or more distribution cases perscheme may prove useful as a training aid for productive scheme distribution by trainees and as a quick reference guide for experienced personnel.

332.132 **Trainee Study Areas.** The trainee must know the boundaries of each separation in the scheme. After mentally placing an address in the correct geographic location, the trainee cant hen determine which separation serves the address. A basic knowledge of the city and the order of streets will greatly reduce the difficulty of what must be learned for a secondary scheme.

332.14 **Acquisition.** Usually, maps can be obtained from the Address Information System (AIS) section located at most MSCs. Additionally, maps can be obtained, at a minimal cost, from City/County/State Planning/Engineering or Transportation Departments.

332.2 **Study/Practice Cards**

332.21 **Preparing Study/Practice Cards.** Indicate the scheme item on the face of the card (street name or number and address range). Indicate the correct separation (SCF, ZIP Code, carrier number, etc.) on the back of the card.

332.22 **Issuance and Use.** Trainees are issued a deck of study/practice cards corresponding to the scheme they are currently learning. As each lesson is learned, the study cards for that lesson are combined with study cards from previously learned lessons to produce a complete review deck. The cards should be shuffled thoroughly before they are cased to prevent learning them by sequence rather than by item. Maintain cards on postal premises at all times.

332.3 **Flash Cards**

332.31 **Description.** Flash cards are large replicas of study/practice cards. Dimensions should be determined by classroom application. However, card size, as well as the numbers and lettering on flash cards, must be large enough to be read easily.

332.32 **Preparation.** Flash cards are inexpensive and easy to make. Their preparation is to be under the direction of the PEDC.

332.33 **Advantages.** Flash cards are especially useful in scheme orientation classes to explain the use of study/practice cards. In oral instruction, the flash card design helps trainees to recognize scheme items. Flash cards are well suited to lesson review in classroom situations.

332.4 **Projection Equipment**

332.41 **Overhead Projectors.** An overhead projector and transparencies (perhaps with overlays) may be useful when presenting some features of lesson assignments, such as ZIP Code boundaries, carrier routes, or other geographic features.

332.42 **Film Projector.** A film projector capable of flashing scheme items or individual addresses on a screen can also be used to good advantage to enhance oral instruction.

332.5 **Display Charts and Chalkboard.** A display chart and/or chalkboard should be available to the scheme instructor to use when clarifying or expanding upon a point of interest.

332.6 **Study/Practice Cases**

332.61 **Description.** Management should provide instructors with study/practice cases which are replicas of cases on the workroom floor. These cases will be used for distribution of the scheme being learned. Training personnel will ensure that practice cases are set up and labeled identically as the distribution cases are on the workroom floor.

332.62 **Use**

332.621 Case practice is used in connection with the various methods of scheme training to assist the trainee in learning to case scheme items properly.

332.622 Case diagrams illustrating the layout of the appropriate scheme separations may be provided to trainees.

332.623 An effective way for a trainee to learn the separations on a case is to practice with a set of cards labeled with only the name and number of a single ZIP Code, carrier route, or sectional center. Placing the scheme cards into the case in the proper separation will (a) assist the trainee to rapidly locate the positions of each separation and (b) help the trainee to develop the proper rhythm and casing motion.

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4 Computer-Assisted Scheme Training System

410 Purpose

This chapter describes policies and training procedures applicable to the Computer-Assisted Scheme Training (CAST) System.

411 What Is CAST?

CAST is a computerized system for learning schemes. It may be used instead of the traditional scheme study cards. This computerized system:

- a. Controls the number of scheme items seen at one time.
- b. Provides trainees with drill and practice of scheme items.
- c. Keeps track of how well a trainee knows individual items and automatically presents items with greater or lesser frequency based on the trainee's knowledge.
- d. Provides for consistent study and reviews during each training session.
- e. Provides weekly reviews of learned items.
- f. Provides the qualification test.

412 Who Uses CAST?

- 412.1 **Required.** Effective September 24, 1988, CAST is mandatory for all newly hired clerk craft employees. Employees hired on or after September 24 who (a) are assigned, (b) select a preference for a scheme position, or (c) bid a scheme position will train using the CAST system.
- 412.2 **Exceptions.** The only exceptions are those employees at associate offices, level 22 and below, and station/branches with on-site scheme training where it is not feasible to provide equipment and/or staff to support CAST.
- 412.3 **Optional.** All manual scheme trainees hired prior to September 24, 1988, whether voluntary bid or assigned scheme, on- or off-the-clock, will be offered the option of learning their scheme with the assistance of the CAST system if computers are available.
- 412.4 **Subsequent Assignments.** If a trainee does not elect to train on the CAST system for a particular scheme or bid assignment, this does not prevent the trainee from choosing this option for a future scheme training assignment.

413 Presentation of Scheme Items

For both the computerized and manual scheme training procedures, the Manager/Supervisor, Training, determines the order in which carrier routes are presented. However, the recommended order of computerized presentations is:

- a. Identify the carrier route having the highest density and enter the address data for that route first.
- b. Next, enter the data for the highest density route that is adjacent to the first route identified.
- c. Continue adding the highest density route which is adjacent to the previous route presented until all routes have been entered.

420 Training Elements

421 Hardware/Software Requirements

Apple IIe microcomputers are capable of providing CAST. The following hardware/software is required:

- a. Central Processing Unit (CPU) — Computer console with typewriter keyboard.
- b. Video Display Unit — Item that resembles a television. This unit displays the scheme items on the screen.
- c. Disk Drive Unit — Memory storage unit.
- d. Printer Unit — Prints out the trainee's record of training.
- e. Numeric Keypad — Used to key numbers.
- f. Floppy diskette — Flexible magnetic storage diskettes on which scheme programs are stored.

422 Diskettes

Trainees who select the CAST system as their method of scheme training are assigned a floppy diskette to use during training. Diskettes are to be stored in an appropriate place by the instructor. They are to be handled only by the instructor and the trainee.

- a. At the end of each training session, the instructor updates the master diskette to provide a record of the employee's progress.
- b. Also, it is recommended that, at the end of each day, the instructor make a back-up copy of the PEDC master diskettes of those students who trained during the course of the day. These copies must be stored in a secure location. For proper handling and storage of diskettes, instructors should consult the Introduction to Computer-Assisted Keyboard Training Units printed under separate cover.

423 Lesson Printouts

- 423.1 **Master Printouts.** Subsequent to the LINK program's creation of either alphabetical lessons or lessons arranged by predetermined carrier routes (Order selection), an optional lesson printout is made available. These master printouts can be photocopied for use by trainees during the course of their training. As with all training materials, these must be kept on postal premises and can be used only during authorized training sessions.
- 423.2 **Scheme Items Learned.** After the PEDC master diskette has been updated, and, upon request, the computer will generate a printout of the scheme items learned that session. Retain these printouts for 3 months from the date the training is completed. Additionally, on a daily basis, the instructor must document the trainee's progress on Form 2432.

430 Training Guidelines and Procedures

431 Orientation

- 431.1 **Procedures.** Orientation is required for CAST system trainees and is given as follows:
- a. Employees who have never received manual scheme orientation receive a 2-hour manual scheme orientation.
 - b. Employees who have previously undergone manual scheme orientation receive a 1-hour orientation of the CAST system training.
- 431.2 **Topics.** Topics covered during orientation include, but are not limited to, the following:
- a. Introduction to the Apple IIe training system.
 - b. Study methods.
 - c. Support materials (maps, carrier schemes, etc.).
 - d. Allotted study time.
 - e. Qualification standards.
 - f. Lesson plan format printouts.
 - g. Printouts associated with each study session.
 - h. Review processes that include weekly and optional reviews.
 - i. Final exam.

432 Study Time

- 432.1 **Allowed Time.** Employees who elect the CAST option have the same amount of training hours as that allotted manual scheme trainees, i.e., 16 items per hour and, for increments of less than 16 items, 4 minutes for each additional item.
- 432.2 **Additional Time.** No additional study time is authorized for trainees who elect this option.

432.3 **Method Selection.** Trainees who do not choose the CAST system before beginning scheme study are not allowed to change to this system after they begin manual scheme training.

432.4 **Hours Used.** Trainees may discontinue the use of the CAST system once started; however, any hours they have already used for training are credited toward noncomputerized scheme study on the same assignment or bid.

433 **Learning Cycle**

433.1 **Learning Sequence.** As scheme items are memorized, they are placed into an aging pool. Items in the aging pool will then be reviewed in subsequent, predetermined sessions (e.g., items learned in session 1 will be placed in the aging pool and reviewed in sessions 2, 4, 7, 11, and 16; items learned in session 2 will be reviewed in sessions 3, 5, 8, 12, and 17, etc.). Once the items have been correctly identified in five separate review lessons, they are placed in the learned pool.

433.2 **Miskeyed Items.** If, during any review, scheme items in the aging pool are keyed incorrectly, then those items will be returned to the unlearned pool and must be studied again.

434 **Trainee Reviews**

434.1 **Optional Reviews.** Trainees may opt to review all learned items at any point during the scheme training. All time spent on optional reviews is counted as scheme training time.

434.2 **Weekly Scheme Reviews**

434.21 **Purpose.** Scheme instructors conduct weekly reviews which provide them with information about the trainee's ability to learn the required items during a specific time frame and which assist them to monitor the trainee's progress.

434.22 **Scope.** All trainees studying on the CAST system receive weekly reviews.

434.23 **Review Items.** Trainees are given a review on all scheme items in the pool of learned and studied items, i.e., all items the employee has seen during training sessions. The actual review consists of a computer-generated random selection of 100 items from the pool of learned items flashed on the video display unit. If less than 100 items are available at the time the review is conducted, the instructor will use all of the items that the trainee has learned and studied up to that point.

434.24 **Time Allotted.** Time spent for weekly reviews is in addition to allotted study time. Review time is determined by allowing 4.8 seconds for each item (if less than 100 items) but no more than 8 minutes for 100 items.

434.25 **Review Results.** Instructors must record results obtained from weekly reviews on the trainee's Form 2432.

435 **Consultation**

The weekly review is not the only vehicle a scheme instructor has for monitoring a trainee's progress during scheme training. After each weekly review, the instructor should talk to all trainees concerning their progress.

The instructor observes the trainee's study habits to determine if the trainee could make better use of study time. The time the instructor uses to discuss the results of weekly reviews and other training factors is in addition to the allotted scheme study time. Instructors must note such time on the trainee's Form 2432 as part of weekly review/test time.

436 **Productive Scheme Distribution**

- 436.1 **Proficiency.** Where operationally feasible, productive scheme distribution will be provided as part of the scheme training process. That is, the trainee will be placed in a productive work setting actually distributing live mail on the scheme being studied.
- 436.11 **When to Initiate It.** Productive scheme distribution will be initiated when a PTF trainee who has been assigned a scheme is proficient enough to accurately distribute at least 75 percent of the scheme items by density.
- 436.12 **Senior Bidder.** When the senior bidder completes 80 percent or more of the allotted training time for scheme qualification, the employee will have the opportunity to be tested on the items studied. This test may be taken at the option of the employee.
- 436.121 A senior bidder who scores at least 90 percent on the above test may request assignment to productive distribution during the remainder of the deferment period. Such requests, including a voluntary request for a change in schedule in order to provide such productive distribution, will be granted if operationally feasible.
- 436.122 This test is taken only for the purpose of being assigned to productive distribution and does not count as an attempt to qualify. Employees will be afforded the three opportunities to qualify at the end of the deferment period.
- 436.2 **Visual Aids.** Appropriate visual aids should be provided during this period of productive distribution.
- 436.3 **Advantages.** Productive scheme distribution will help the trainee learn the case set-up and the manual casing of mail. *Note:* Trainees using the CAST system do not use manual scheme cards on practice cases in the PEDC.
- 436.4 **20-Hour Productive Distribution.** In an effort to reduce and/or eliminate any delay between the manual phase and machine phase of training, if productive distribution is initiated at this point (assigned PTFs), the 20-hour productive distribution requirement outlined in [242.2](#) may begin at this training benchmark.

440 Qualification

To qualify on the manual scheme, trainees must identify correctly 100 items flashed on the video display unit in 8 minutes or less at an accuracy of 95percent or better. These items are randomly selected by the computer program and are representative of the entire scheme. The scheme examination is on a separate diskette.

441 **MPLSM Keyboard**

- 441.1 **Availability.** Trainees who will be required to apply the scheme on the MPLSM have the option during manual scheme training to use the MPLSM keyboard rather than the 10-digit keypad. The MPLSM keyboard provides additional familiarization and dexterity prior to the machine application.
- 441.2 **Hours Used.** If, after initiating scheme training on the MPLSM keyboard, trainees decide that they want to switch to the keypad to complete the training, any hours they have used for scheme training on the MPLSM keyboard are credited towards total scheme training time. No additional hours are allowed for keypad training.

450 Scheme Changes

Scheme change training is provided as shown in chapter [2](#).

451 **Formal Study of Scheme Changes**

Formal scheme change training is provided for:

- a. All machine scheme distributors.
- b. Manual scheme distributors who did not have the opportunity to learn the scheme changes through productive distribution.
- c. Certain manual distributors who fail two successive proficiency checks.

452 **Study Time**

The study time allotted for scheme change items is 1 hour for each 16 items or 4 minutes for any increment of less than 16 items. Instructors must annotate this time on Forms 2548 and 2432.

453 **Qualification Test**

453.1 **General**

- 453.11 **Test Not Required.** As in regular manual scheme change training, no qualification test is required for formal scheme change training. Trainees study, on a diskette separate from the total scheme, all scheme changes comprising the formal scheme changes.
- 453.12 **When Formal Scheme Training Ends.** Formal scheme change training ends when either (1) maximum allotted training time is exhausted, or (2) the employee elects to take a qualification test and passes the test by correctly identifying 95 percent of the items randomly selected from the pool of scheme change items and flashed on the computer screen.
- 453.2 **At Employee's Request.** An employee may request to take a qualification test of the scheme changes before the study time is totally exhausted. If such a request is made, the following applies:
- a. The trainee is given a test comprised of all scheme change items on a diskette separate from the formal scheme change study diskette.

- b. Test time is determined by allowing 4.8 seconds for each scheme item change.
- c. If the employee does not attain a score of 95 percent, the remainder of the allotted scheme change study time must be used.

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Glossary

Case: (Noun) Piece of furniture containing separations (pigeonholes) into which letters, flats, or IPPs are sorted.

Case: (Verb) To sort pieces of mail or practice cards into a case.

Case Reexamination: Examination to determine an employee's knowledge of a scheme after two successive failures on proficiency checks.

Case Label: Label placed above each separation on a distribution case which identifies the mail going to that separation.

Distribution: The sortation of pieces of mail by address into machine bins, pigeonholes, cases, trays, sacks, or pouches in order to group pieces of mail for a common destination, area, or postal unit for transportation to the post office of address.

Error: Correctly addressed piece or unit of mail that has been missorted and has to be rehandled.

General Scheme: Pattern of distribution of mail for a state, or section of a state, showing the route or supply by which each post office receives its mail.

Header: See Case Label.

Holdouts: Mail which is held out of the normal distribution plan for any reason, e.g., service or volume.

Letter Case: Case containing boxes or pigeonholes for sorting letters.

Letter Trays: Trays of various designs used in house at letter sorting machines and other conveyor systems, and in place of mail pouches, for transportation between major mechanized facilities and for originating customer mail. Holds between 550 and 600 letters per tray.

Massing Scheme: See State Dispatch List.

Mishandle: To handle mail improperly, causing delay or damage.

Missend: To send or dispatch a piece of mail improperly.

Missent Mail: Mail which has not been dispatched according to official schemes, schedules, or special orders.

Misthrown: Mail erroneously distributed.

Off-the-clock: Off-duty.

On-the-clock: On-duty.

Pigeonhole: An opening on a distribution case. See also Case Noun.

Practice Case: Regular or miniature letter case with separations especially for practising letter distribution with cards representing letters.

Primary: The first sorting operation for outgoing or incoming mail.

Primary Case: Case used for the initial sorting of letter mail.

Scheme: A systematic plan to guide the effective distribution of mail to destination.

Scheme Knowledge: Proven by testing of an incoming, outgoing, or standpoint scheme.

Secondary: The second sorting operation, if required.

Separations: See pigeon hole.

Set Up: To face letter packages and papers on the work table in order to facilitate throwing into sacks and pouches.

Standpoint Distribution: Distribution by use of standpoint scheme.

Standpoint Scheme: Printed or written scheme prepared for the dispatch of mail from a certain location.

State Case: Case on which mail is separated according to city destination in a single state.

State Dispatch List: Guide showing dispatch of state mail to post office or terminals which are equipped and staffed or geographically located best to perform distribution.

Truck Schedule: Details of time of departure and arrival at each postal unit, depot, boat dock, terminal, etc., involving the operation of a vehicle.

Workup: To complete distribution.

ZIP Code (Zoning Improvement Plan): A five-digit code which simplified the distribution of mail by identifying an individual post office or a delivery area within a city.